FI$Cal
Financial Information System for California

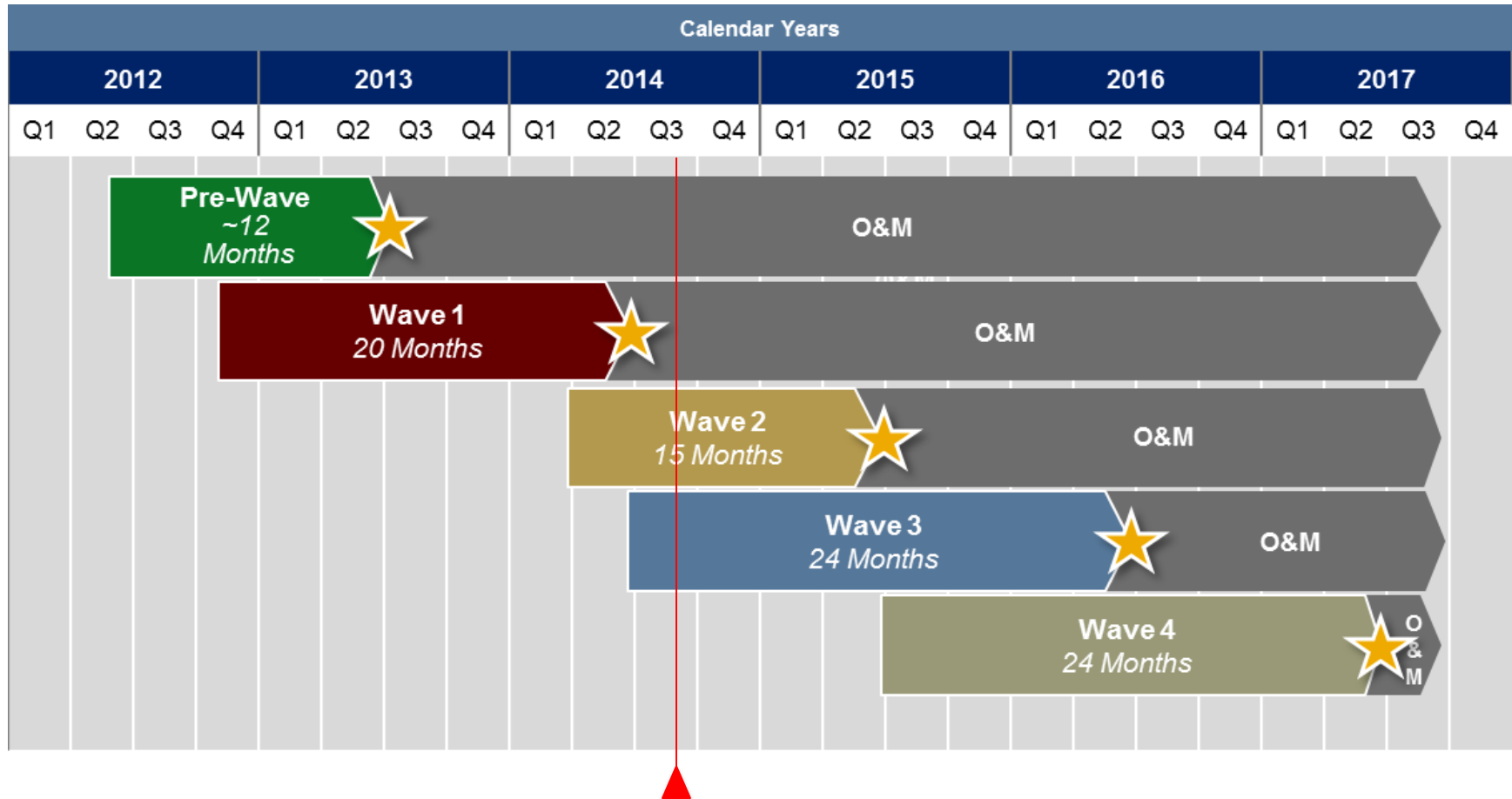# Wave 2
Training Liaison
Kickoff

September 17, 2014

Agenda

- **Project Overview**
- **Wave 2 End-User Training Overview**
  - ☐ Development and Deployment Methodology
  - ☐ Learning Tools
- **Primary Duties of Training Liaisons**
  - ☐ Role Description
  - ☐ Upcoming Master Department Workplan Tasks
  - ☐ Training Task Support
- **Next Steps**

FI$Cal Project Timeline
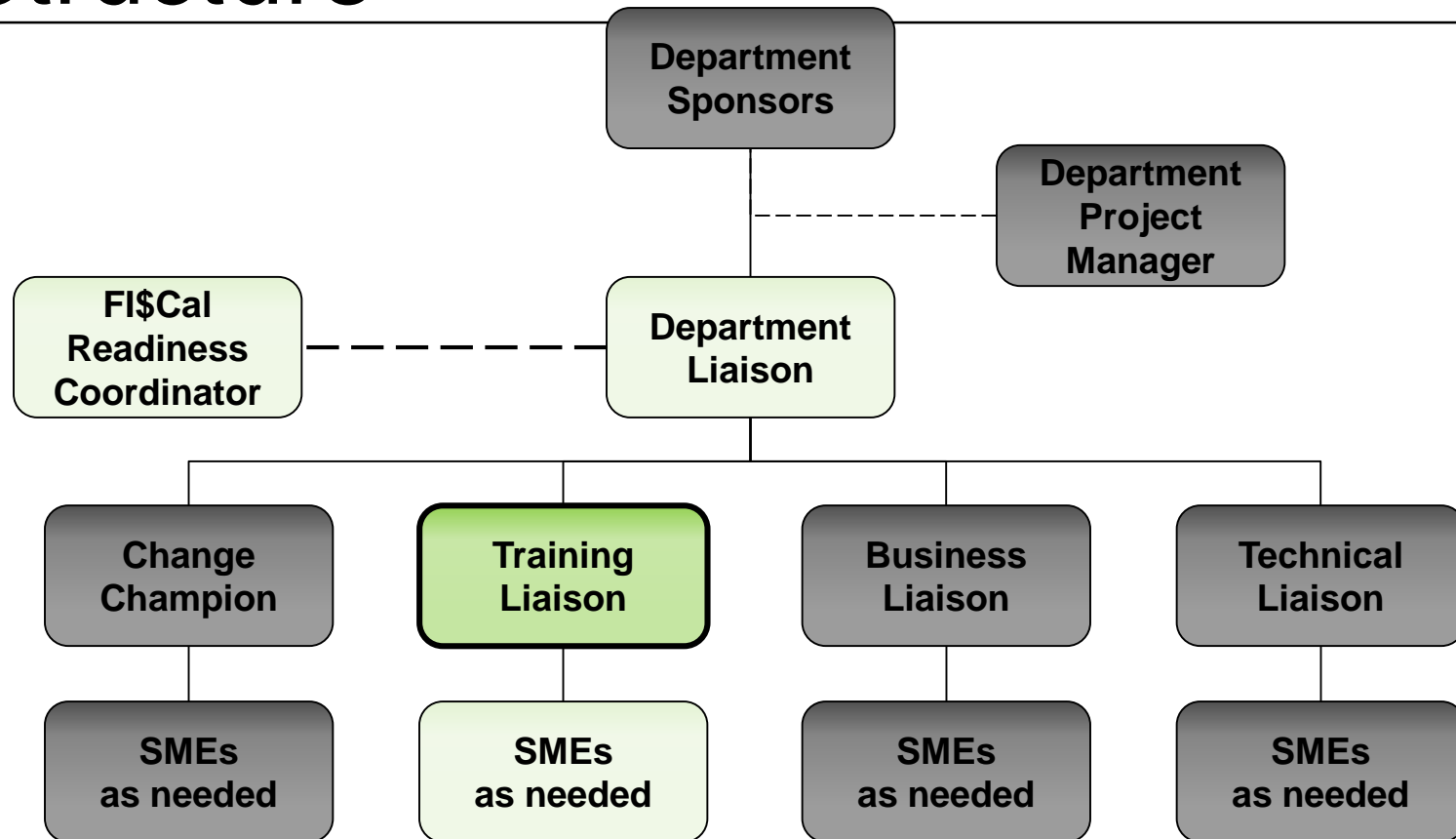
Wave 2 Scope

- **Procurement**
  - ☐ Sourcing, bidder registration, intent to award communication, contracts, interagency agreements, real property acquisitions
  - ☐ Replacement of BidSync functions
  - ☐ Public Access to CSCR, SCPRS, SB/DVBE, LPA contracts, and Progress Payments
  - ☐ Vendor certification and self-service invoicing
  - ☐ Statewide Vendor Management file for procurement
  - ☐ Delegated Authority, G$mart, and CMAS functions
  - ☐ Bid Protests

Wave 2 Scope

- **Accounting**
  - □ Projects/Grants Accounting – Creation of pre-award Grants, Federal funds administration and integration of federal contract billing, Primavera project management
  - □ Asset Accounting – Hand-held scanning capability
  - □ Billing – DGS billing

Department Implementation Team Structure


```
                    ┌──────────────┐
                    │ Department   │
                    │ Sponsors     │
                    └──────┬───────┘
                           │                    ┌──────────────┐
                           │- - - - - - - - - - │ Department   │
                           │                    │ Project      │
                           │                    │ Manager      │
                           │                    └──────────────┘
  ┌──────────────┐         │
  │ FI$Cal       │    ┌────┴─────────┐
  │ Readiness    │- - -│ Department   │
  │ Coordinator  │     │ Liaison      │
  └──────────────┘     └────┬─────────┘
```

Change Champion	Training Liaison	Business Liaison	Technical Liaison
SMEs as needed	SMEs as needed	SMEs as needed	SMEs as needed

Training Liaison Role & Duties

- Member of the Department Implementation Team (DIT)
- Training Liaison Duties include:
  - Serving as the primary contact for FI$Cal end-user training
    - Training Liaison Kickoff
    - Department Touchpoints
  - Coordinate the completion of Master Department Workplan (MDW) tasks which support training delivery
    - Approximately 20 tasks until go live, such as managing training participation
  - Provide administrative and logistical support for training activities
    - Assist in testing and reserving training rooms
  - Communicate to the FI$Cal Project your department's training needs
    - Any special accommodations

Four Parts of Training Deployment

Training Analysis points FI$Cal in the right <u>direction</u>. *The gathered information provides preliminary data to commence planning activities.*

Training Planning shows FI$Cal the right <u>destination</u>. *The gathered information will lay the foundation by defining clear executable steps.*
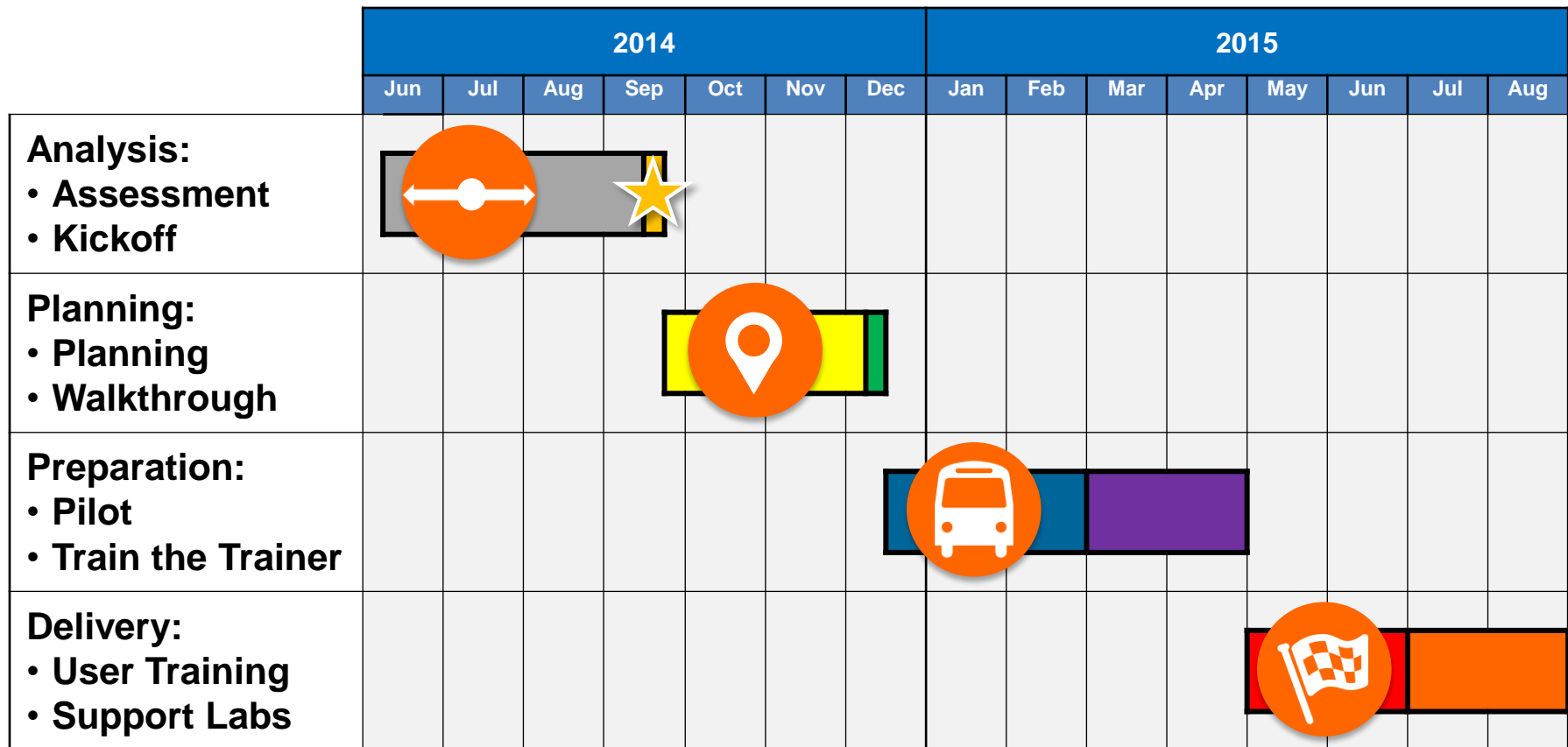
Training Preparation builds FI$Cal the right <u>vehicle</u>. *The effort by departments will refine courses and equip trainers with the tools to be successful.*

Training Delivery brings FI$Cal to the end <u>goal</u>. *The training will enable users to perform in a new statewide financial information system.*

Wave 2 Training Timeline

	2014							2015							
	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Analysis: • **Assessment** • **Kickoff**															
Planning: • **Planning** • **Walkthrough**															
Preparation: • **Pilot** • **Train the Trainer**															
Delivery: • **User Training** • **Support Labs**															

Analysis ▸ Planning ▸ Preparation ▸ Delivery

Training Timeline: Analysis

	2014						
	Jun	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Training Needs Assessment	⬜ TRNG202						
Attend Training Liaison Kickoff				⭐ TRNG205			

| Analysis | Planning | Preparation | Delivery |

Training Timeline: Planning

	2014						
	Jun	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Submit Department End-User Counts				**TRNG225**	�yellow		
Provide Training Room Location Information				**TRNG226**	�yellow		
Submit Preferred Department Training Approach					**TRNG206**	▮yellow	
Attend Training Deployment Walkthrough						**TRNG227**	▮green

Analysis ▸ **Planning** ▸ Preparation ▸ Delivery

Training Timeline: Preparation

	2015						
	Jan	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**
Participate in Department-Specific Training Discussions with FI$Cal	TRNG204, 208, 211, 213, 215, 218						
Communicate Department Training Deployment Guide	TRNG207						
Send First Role Mapping Workbook Submission	TECH237a						
Attend Pilot Training			TRNG210				
Identify Train the Trainer participants			TRNG209				
Attend Train the Trainer (TTT) Program				TRNG224			

Analysis > Planning > **Preparation** > Delivery

Training Timeline: Delivery

	2015							
	Jan	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**
Register Dept End-Users for Core Delivery of FI$Cal End-User Training				TRNG212 ▮				
Attend Core Delivery of FI$Cal End-User Training					TRNG216 ▮▮			
Manage Core End-User Training Participation					TRNG217 ▮▮			
Register for Training Support Labs						TRNG214 ▮▮		
Participate in Training Support Labs						TRNG219 ▮▮▮		
Manage Participation in Training Support Labs						TRNG220 ▮▮▮		
Register Department End-Users for Secondary Delivery of FI$Cal End-User Training					TRNG221 ▮			
Attend Secondary Delivery of End-User Training						TRNG222 ▮		
Manage Secondary End-User Training Participation						TRNG223 ▮		

Analysis ▸ Planning ▸ Preparation ▸ **Delivery**

Training MDW Task Overview

- The FI$Cal Project will release a series of training tasks that will help prepare your department and FI$Cal for FI$Cal end-user training
  - These tasks document the key activities necessary to prepare departments for end-user training
- The new tasks supplement the pre-existing training tasks that already appear on your MDW
  - The next few slides will review these tasks and provide a completion timeline
- Training Liaisons will ultimately be responsible for the completion of Training MDW tasks

Training Timeline: Analysis

	2014						
	Jun	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Training Needs Assessment		TRNG202					
Attend Training Liaison Kickoff				⭐ TRNG205			

Analysis → Planning → Preparation → Delivery
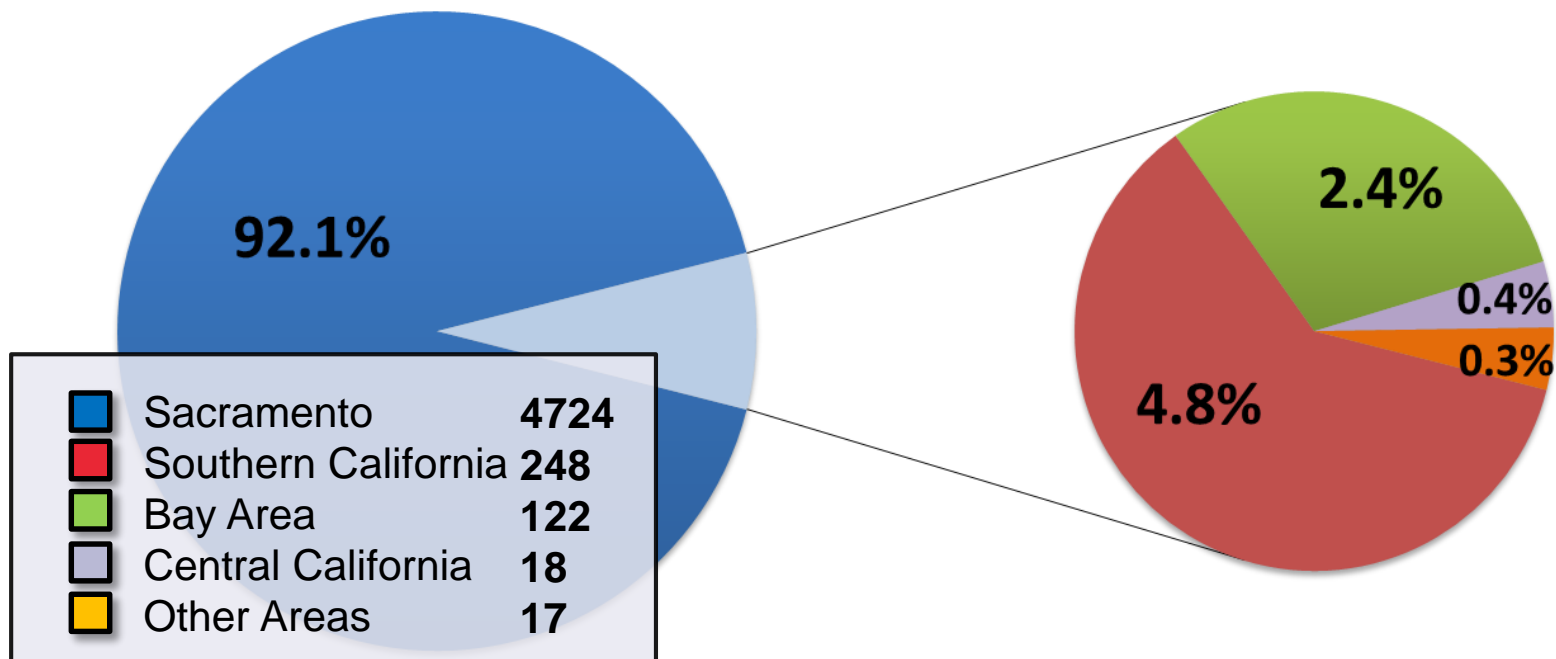
TRNG202:Training Needs Assessment

- Questions sent to the Training Liaison and Department Liaison to gather preliminary information
- Gained insight into:
  - End-user Population
  - Training Room Availability
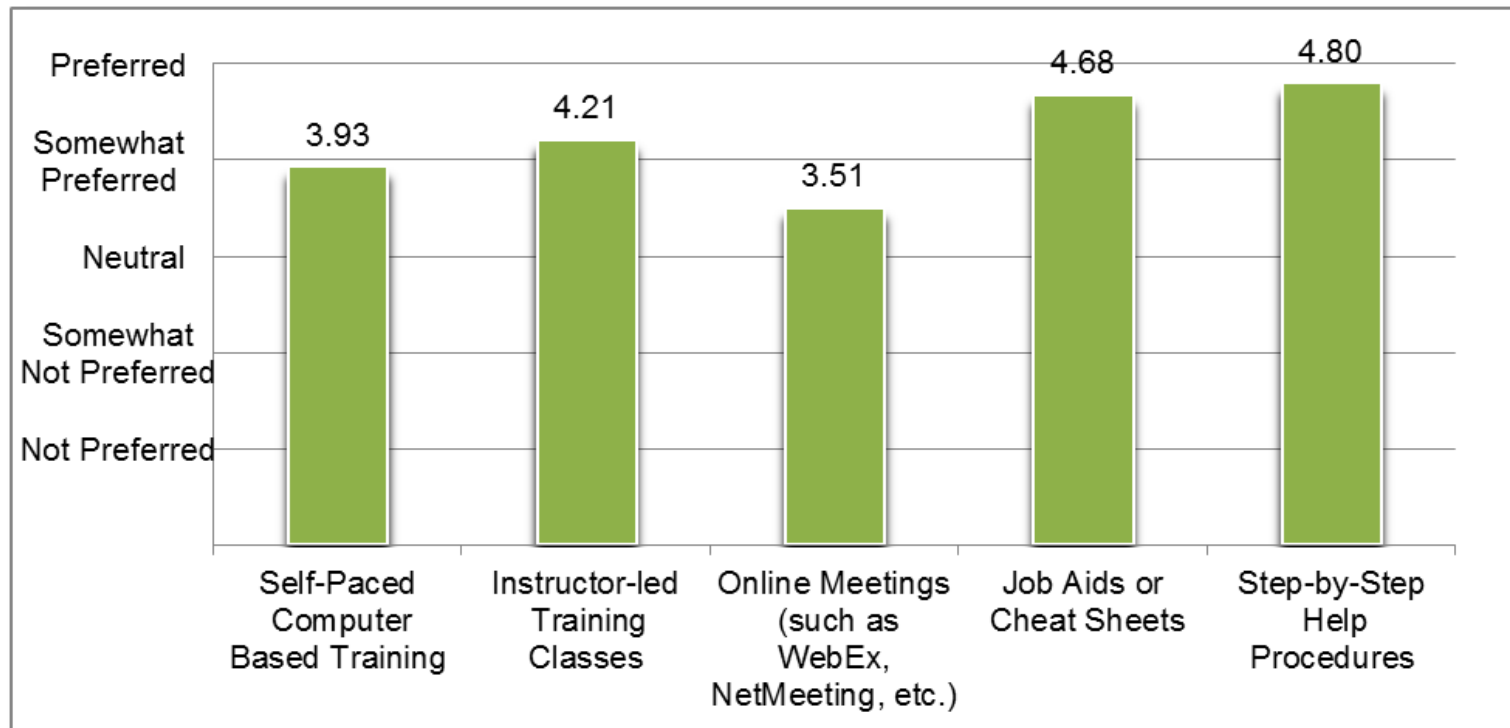 - Accessibility Needs
  - Training Delivery Preferences

Analysis | Planning | Preparation | Delivery

TRNG202: End-User Counts

- 4,565 end-users estimated to participate in training
- 5,150 total estimated end-users including other sources

■ Sacramento	**4724**	
■ Southern California	**248**	
■ Bay Area	**122**	
■ Central California	**18**	
■ Other Areas	**17**	

Analysis | Planning | Preparation | Delivery

TRNG202: Preferred Training Methods

- **Note:** Job Aids or Cheat Sheets and Step-by-Step Help Procedures had zero participants select "Not Preferred" and one "Somewhat Not Preferred"

Analysis ▸ Planning ▸ Preparation ▸ Delivery

Lessons Learned:
Wave 1 and Needs Assessment

- Step-by-Step Approach
    - A step-by-step approach to all courses
    - Virtual instructor-led training (VILT) least preferred
- Early Engagement
    - Activate Training Liaisons in September
    - Information on departments to influence all training phases
- Increased Communication
    - Clearer communication on milestones, schedules, timelines
    - More frequent communication
- Course Improvements
    - More web-based training (WBT) courses
    - Reassess course durations based on complexity and user feedback
- End-User Roles
    - Mapping end-user roles directly to courses

Analysis | Planning | Preparation | Delivery

Training Timeline: Planning

	2014						
	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Submit Department End-User Counts				TRNG225	▮		
Provide Training Room Location Information				TRNG226	▮		
Submit Preferred Department Training Approach					TRNG206	▮	
Attend Training Deployment Walkthrough						TRNG227	▮

Analysis **Planning** Preparation Delivery

TRNG225: Submit Department End-User Counts for End-User Training

- All Wave 1 and Wave 2 Departments will provide estimated end-user count information, based on:
  - ☐ Number of end-users
  - ☐ Location of end-users
  - ☐ Business Process Tasks
- This will allow FI$Cal to determine the number of courses and training rooms for end-user training

- Submit the completed TRNG225 Response Template **_by Friday October 31, 2014_**

Analysis | **Planning** | Preparation | Delivery

TRNG226: Provide Training Room Location Information

- All Wave 1 and Wave 2 Departments were asked about their ability to provide training rooms. Departments will make final decision based on:
  - ☐ Ability to train users on-site
  - ☐ Training Rooms meeting FI$Cal software requirements
- This will allow FI$Cal to determine the number of courses and training rooms for end-user training

- Submit the completed TRNG226 Response Template **_by Friday October 31, 2014_**

Analysis | **Planning** | Preparation | Delivery

TRNG206: Submit Preferred Department Training Approach

- All Wave 1 and Wave 2 Departments will work with FI$Cal to plan the appropriate approach for training their end-users including the determination of:
  - ☐ Participation in Training Pilot
  - ☐ Participation in Train the Trainer (TTT)
  - ☐ Approach to training super-users
  - ☐ Training of department end-users based on size of department
  - ☐ Distance Learning

- Submit the completed TRNG206 Response Template ***by Friday December 5, 2014***

| Analysis | **Planning** | Preparation | Delivery |

TRNG227: Attend Training Deployment Walkthrough

- Training Liaisons will return to FI$Cal in December to receive a walkthrough of FI$Cal Training Deployment, including:
  - ☐ Training Delivery Format
  - ☐ Training Delivery Hubs and Locations
  - ☐ Train the Trainer Overview
  - ☐ End-User Registration Process
  - ☐ Availability of Introductory Training Classes

- Training Deployment Walkthrough will occur in ***December 2014***

Analysis   **Planning**   Preparation   Delivery

Future Activities: Preparation

- **Dates:** January-April 2015
- **Key Activities:**
  - ☐ Training Deployment Guide
  - ☐ Training Pilot
  - ☐ Train the Trainer Program
- **Training Liaison Primary Responsibility:**
  Communication and Task Completion

Analysis	Planning	**Preparation**	Delivery

Future Activities: Delivery

- **Dates**: April-August 2015
- **Key Activities**:
  - ☐ Core Delivery of End-User Training
  - ☐ Training Support Labs
  - ☐ Secondary Delivery of End-User Training
- **Training Liaison Primary Responsibility:**
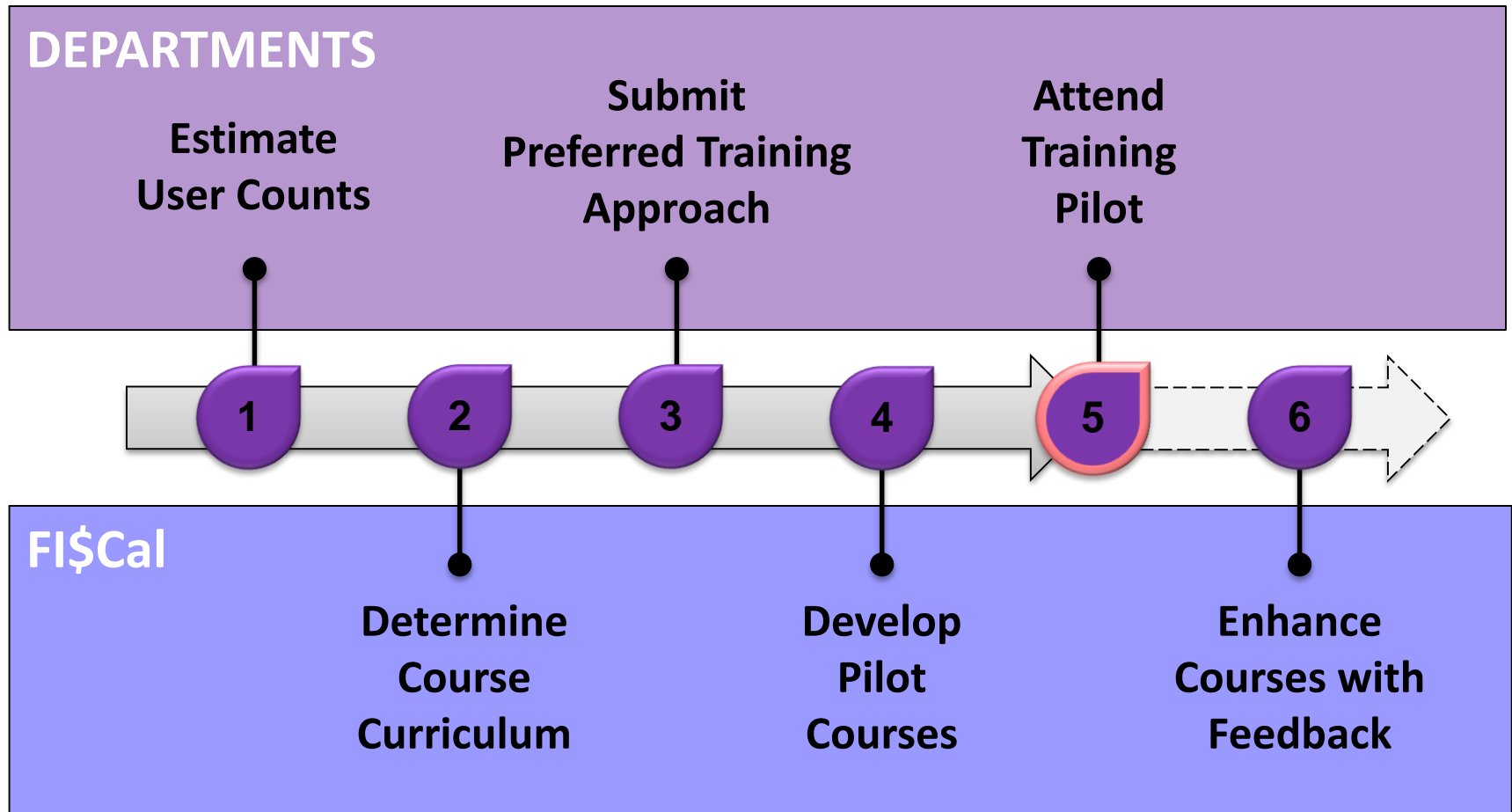 *Manage Registration and Participation*

Analysis | Planning | Preparation | **Delivery**

Step-by-Step
Training Liaison Activities
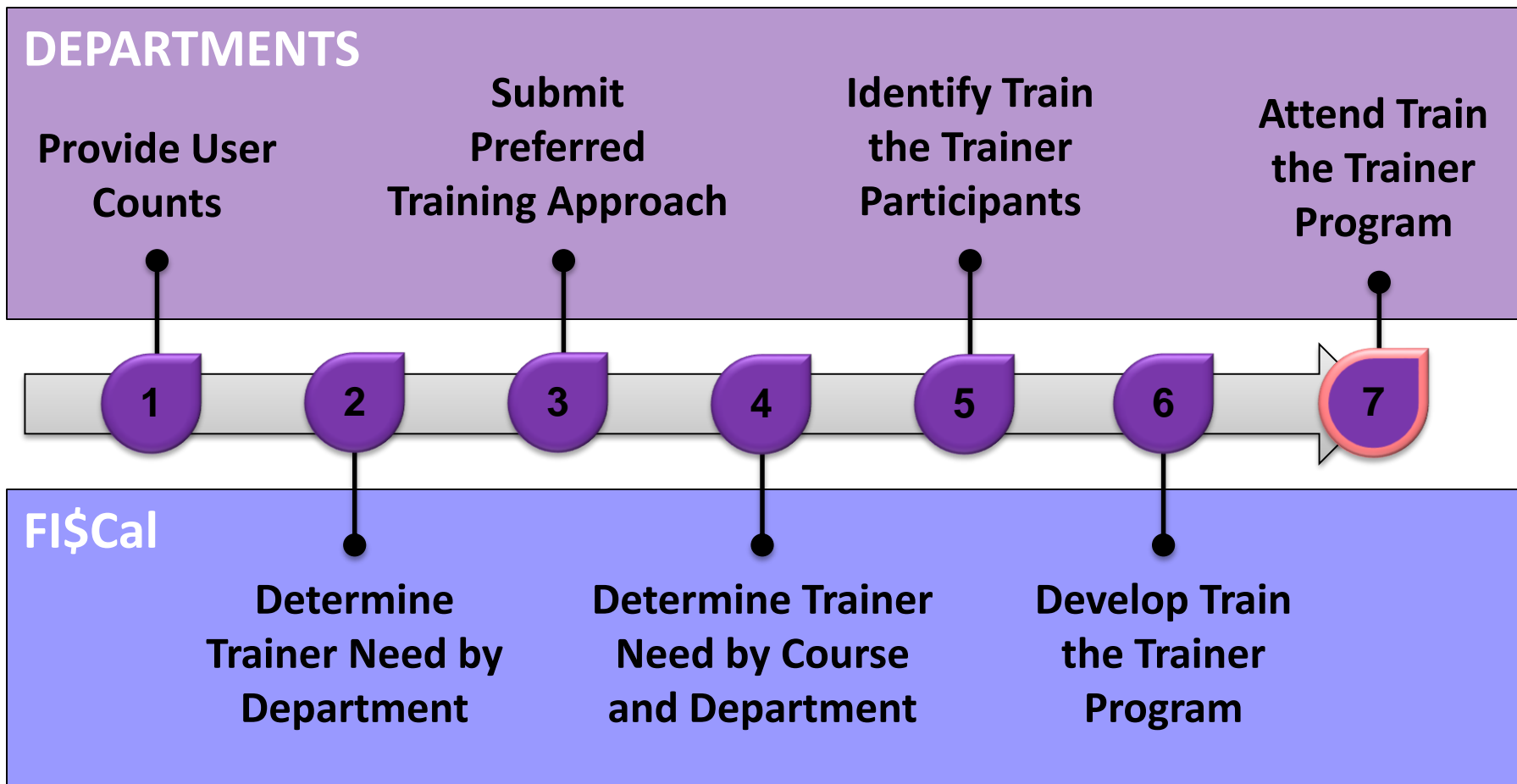
- Training Liaison assists FI$Cal in four main areas:
  - ☐ Training Pilot
  - ☐ Train the Trainer
  - ☐ Training Rooms
  - ☐ End-User Training
- FI$Cal and your department will alternate our contributions in these four areas
- The Training Liaison is a *coordinator* of these activities, providing work to the appropriate expert, and returning the information to the Department Liaison/FI$Cal

Steps to Training Pilot

DEPARTMENTS

Estimate User Counts

Submit Preferred Training Approach

Attend Training Pilot

FI$Cal

1 2 3 4 5 6

Determine Course Curriculum

Develop Pilot Courses

Enhance Courses with Feedback

Steps to Train the Trainer (TTT)

DEPARTMENTS

Provide User Counts

Submit Preferred Training Approach

Identify Train the Trainer Participants

Attend Train the Trainer Program

1   2   3   4   5   6   7

FI$Cal

Determine Trainer Need by Department

Determine Trainer Need by Course and Department

Develop Train the Trainer Program

Steps to Statewide Training Rooms

DEPARTMENTS

Estimate Room Availability — 1

Confirm Room Information and Availability — 3

Reserve Training Rooms — 5

1 2 3 4 5 6

FI$Cal

Determine Training Room Needs — 2

Test Training Workstations — 4

Provide Statewide Training — 6
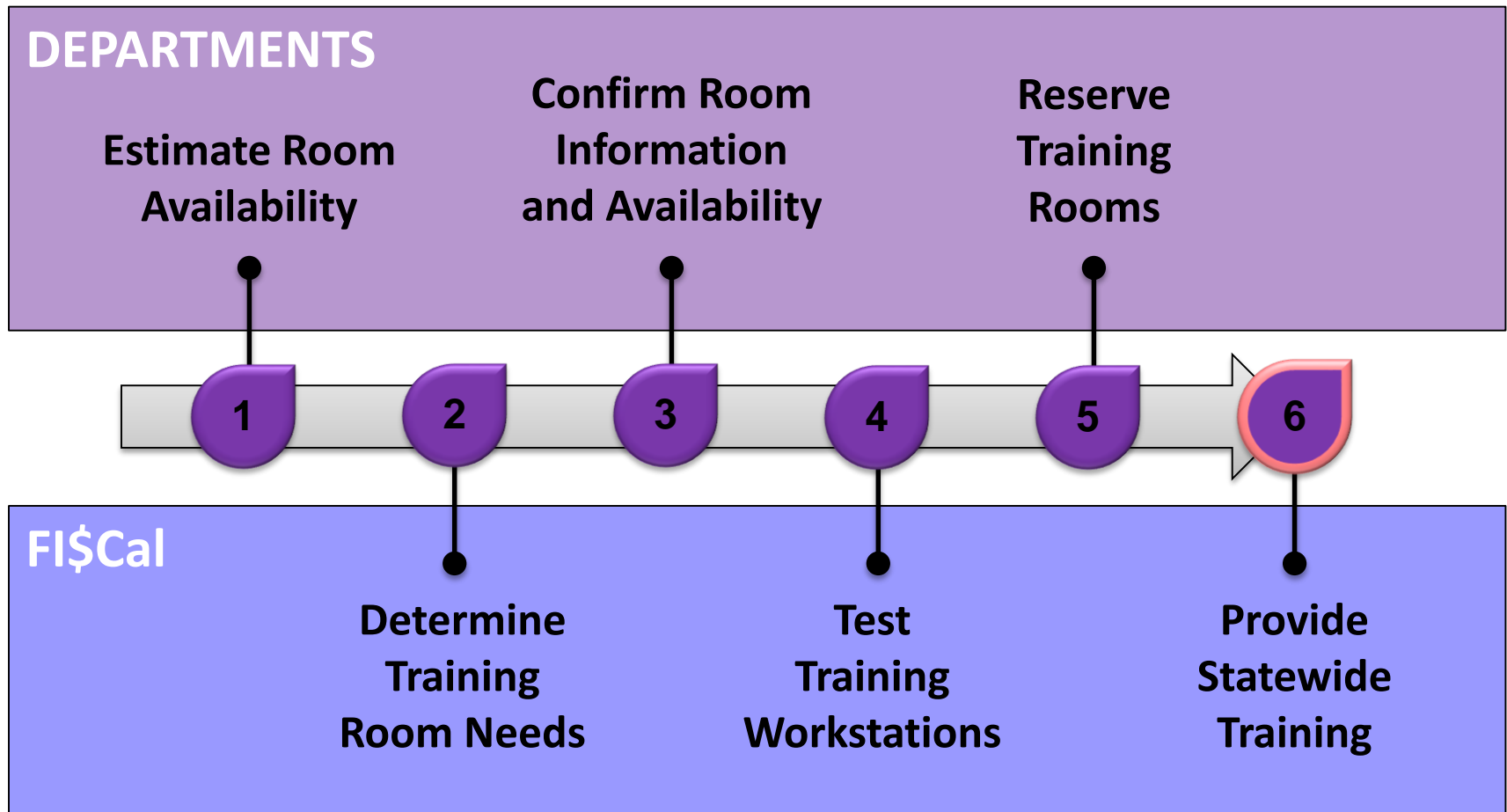
Steps to End-User Training

FI$Cal

DEPARTMENTS

Estimate User Counts	Provide User Counts by Job Function	Send First Role Mapping Submission	Register and Attend End-User Training	Manage Training Participation

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |

FI$Cal

Determine Course Curriculum	Design Course Schedule by Location	Finalize Course Schedule	Conduct End-User Training
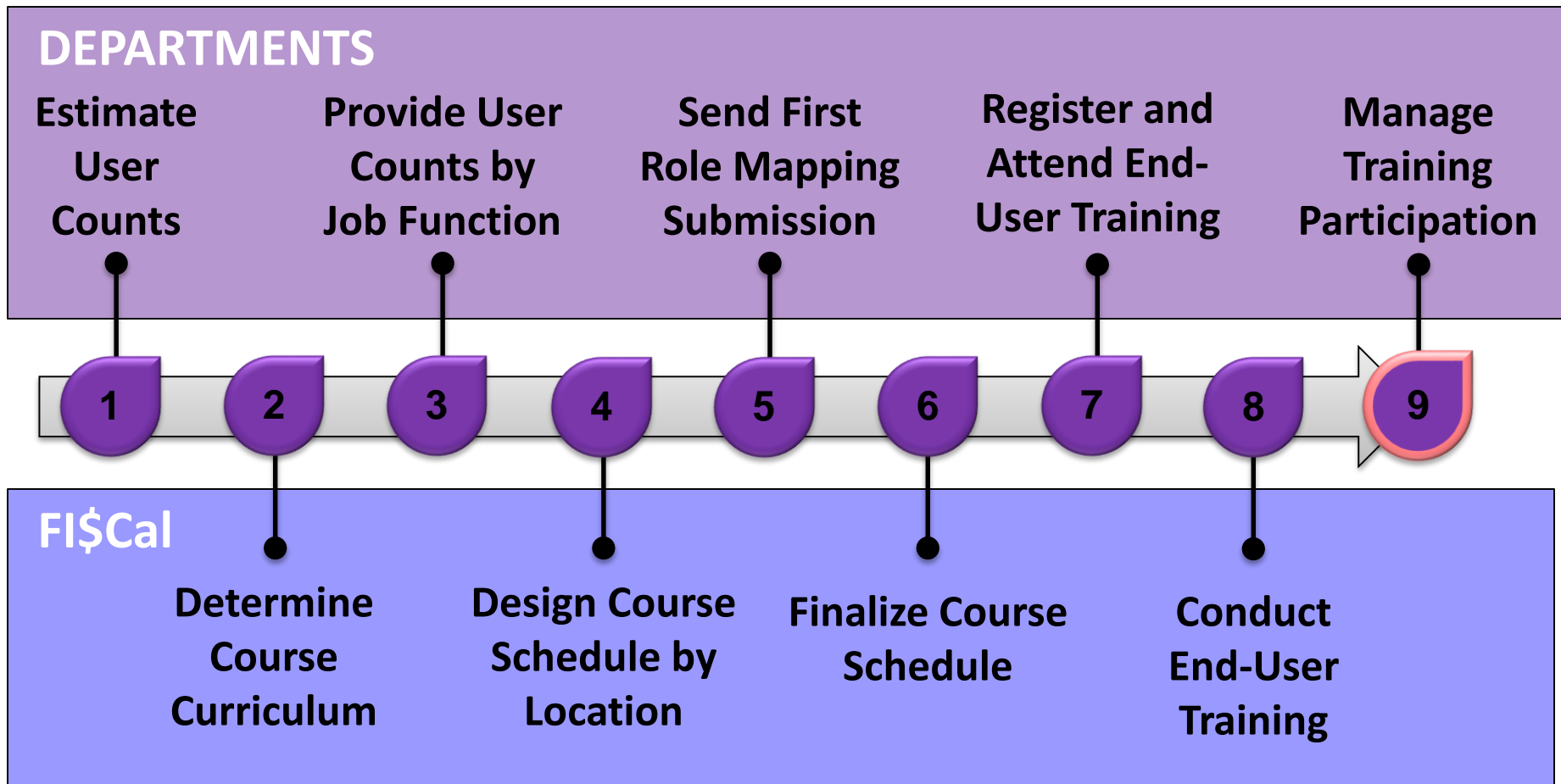
Wave 1 Training Liaison Experience

- Wave 1 Experience
- Questions and Discussion

Next Steps

- Due on October 31, 2014:
  - ☐ **TRNG225**: Submit Department End-User Counts for End-User Training
  - ☐ **TRNG226**: Provide Training Room Location Information
- Due on December 5, 2014:
  - ☐ **TRNG206**: Submit Preferred Department Training Approach
- Attend Training Deployment Walkthrough
  - ☐ December 2014

Questions

FI$Cal Project Information:

http://www.fiscal.ca.gov/

or e-mail the FI$Cal Project Team at:

fiscal.cmo@fiscal.ca.gov